World Production and Trade

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The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

OILSEEDS AND PRODUCTS

Stagnant demand for livestock feed and ample supplies of alternative oilseeds and feedstuffs have reduced soybean and soybean meal imports and consumption in the EUROPEAN COMMUNITY (EC). Large supplies of domestic oilseeds as well as other soybean meal substitutes (corn gluten feed, dried milk, distillers byproducts, palm and copra meals) are creating difficult market conditions for soybean meal.

The Belgian crushing industry, although operating at near capacity, faces declining exports of products and no growth in domestic meal consumption for 1984/85. This, combined with readily available rapeseed meal, points to reduced soybean imports. In the United Kingdom, analysts anticipate a decline in 1984/85 compound feed use by 20-25 percent. The EC dairy quota has caused feed demand to plummet and record 1984 domestic rapeseed and wheat crops have sharpened the competition with other protein ingredients. Denmark's soybean and soybean meal import forecasts for 1984/85 have been reduced due to lack of demand from farmers and feed compounders. The Danish dairy sector is using less concentrates in feed, while hog and poultry rations will incorporate more corn gluten feed and field peas than last year. The EC dairy quota has affected West German demand for protein meals as well. Faced with a difficult domestic economic situation, farmers are saving money by reducing purchases of compound feeds. West Germany's 1984/85 estimated rapeseed production and crush are at record levels.

DAIRY, LIVESTOCK AND POULTRY

WORLD meat production in 1984 is expected to total about 121 million tons, less than 1 percent above 1983. A similar increase is forecast for 1985. Beef production will likely increase in 1984, but may decline slightly in 1985. World pork production is expected to remain relatively stable in 1984 and should increase slightly in 1985. Poultry meat output, estimated up more than 2 percent in 1984, is anticipated to increase even faster in 1985.

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Meat Production in Selected Countries

	1983	Estimated 1984	Forecast 1985
	---------Million Tons---------		
Beef and Veal	41.1	41.8	41.5
Pork	50.8	50.7	51.2
Sheep and Goat Meat	4.6	4.6	4.7
Total Red Meat	96.6	97.1	97.4
Poultry Meat	23.3	23.9	24.7
Total Meat	119.9	121.0	122.1

World beef and veal production is expected to increase about 2 percent in 1984, and beginning 1985 cattle numbers are forecast up slightly, primarily because of an expected increase in the USSR.

In Canada and the United States, cattle numbers are expected to continue to decline. Poor producer returns and drought in some areas have contributed to the decline. Beef production in the United States is up this year, but likely will decline in 1985.

Cattle Numbers and Beef Production 1/

Country	Beginning Cattle Inventory			Beef and Veal Production		
	1983	1984	1985 3/	1983	1984 2/	1985 3/
	-------Million Head-------			------Million Tons------		
United States	115.2	114.0	111.4	10.7	11.0	10.5
Canada	11.6	11.3	11.1	1.0	1.0	1.0
Brazil	93.0	93.3	93.7	2.4	2.2	2.3
EC-10	78.8	79.5	78.2	6.8	7.3	7.1
Eastern Europe	37.1	37.8	37.8	2.4	2.5	2.5
Soviet Union	117.2	119.6	121.0	7.0	7.2	7.3
Argentina	58.0	58.6	58.7	2.4	2.5	2.5
Uruguay	10.3	9.5	9.8	.4	.4	.3
Australia	22.5	21.8	22.6	1.4	1.2	1.4
New Zealand	7.9	7.6	7.9	0.5	0.4	0.5
Japan	4.6	4.7	4.7	0.5	0.5	0.5
Total of 50 countries	943.9	946.9	947.6	41.1	41.8	41.5

1/ Includes buffalo numbers and meat production. 2/ Estimated.
3/ Forecast.

In Brazil, 1984 cattle slaughter is down because of weak domestic demand and low export prices. Producers are reported to be taking advantage of good pasture conditions to hold cattle back in hopes of improved markets next year. In Argentina, reduced prospects for beef exports and uncertainty in the national economy are likely to limit future herd growth.

In the European Community, heavy slaughter because of the EC dairy program will produce record beef production this year and only a small decline is likely in 1985.

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In Poland, above normal cattle slaughter and improved carcass weights because of good pastures are expected to result in increased beef production in 1984. Next year beef production is expected to fall, but some herd growth is expected.

In the Soviet Union, cattle inventories continue at record levels. Despite less favorable crop and pasture conditions, 1984 beef production is expected to increase by about 3 percent.

In Australia, cattle herds are recovering because of higher prices and good pasture conditions. For 1985, some expansion in cattle slaughter is expected, but herd growth should continue. In New Zealand, good pasture conditions in most areas have allowed both beef and dairy cow numbers to expand.

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WORLD hog numbers are expected to be down at the start of 1985, largely because of declines in China, the EC and the United States. World pork production is expected to resume growth in 1985.

Pork production in the United States is expected to be down this year as producers respond to lower returns. Canadian pork production may be about unchanged in 1984 and 1985. An increased level of live hog exports to the United States helped hold down Canadian pork production in 1984. Brazilian 1984 pork production is down due to high feed prices at the end of 1983. Pork production in the EC is expected to remain unchanged in 1985 from the 1984 level. Pork production in Poland is expected to recover in 1985 because of increased feed supplies.

Hog Numbers and Pork Production

Country	Beginning Hog Inventory			Pork Production		
	1983	1984	1985 2/	1983	1984 1/	1985 2/
	------Million Head------			-----Million Tons-----		
United States	53.9	55.8	54.0	6.9	6.6	6.6
Canada	10.1	10.4	10.4	.9	.9	.9
Brazil	33.5	33.0	33.0	1.0	.9	.9
EC-10	79.3	79.3	77.0	9.7	9.7	9.7
Eastern Europe	70.7	73.3	74.2	6.5	6.4	6.6
Soviet Union	76.7	78.7	79.5	5.8	6.0	6.1
Japan	10.3	10.4	10.5	1.4	1.4	1.5
Total of 36 countries	399.5	407.6	403.7	37.6	37.5	37.9
China	300.8	298.5	296.8	13.2	13.2	13.3
Total of 37 countries	700.3	706.1	700.5	50.8	50.7	51.2

1/ Estimated. 2/ Forecast.

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WORLD sheep and goat meat production is expected to be about unchanged in 1984. In Australia, sheep numbers rose sharply last year as the weather improved. This year, favorable wool prices have encouraged further herd growth. With a larger herd, an increase in slaughter and meat production is forecast for 1985. In the Soviet Union, increased numbers are leading to expanded meat production in 1984.

Sheep Numbers and Meat Production

Country	Beginning Sheep Numbers 1983	1984	1985 2/	Sheep and Goat Meat Production 1983	1984 1/	1985 2/
	------Million Head-----			--------Thousand Tons---------		
Soviet Union	142.2	145.3	145.0	837	850	850
Australia	133.2	138.6	146.0	830	430	520
New Zealand	70.3	70.3	71.1	655	646	670
Total of 29 countries	658.1	668.0	675.0	4,565	4,557	4,682

1/ Estimated. 2/Forecast.

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WORLD poultry meat production is expanding in 1984 despite output declines in the EC, Brazil and Hungary. Production increases forecast for 1985, mainly in the United States and the USSR, likely will push world output nearly 4 percent higher. World egg output is expected to increase slightly in 1984 as declines in Brazil and Spain limit growth. Growth in global egg production in 1985 is forecast to be 1-2 percent as Brazil recovers and the United States and the USSR increase.

Poultry Meat and Egg Production

Country	Total Poultry Meat 1983	1984 1/	1985 2/	Eggs 1983	1984 1/	1985 2/
	----Million Tons----			------Billion-------		
United States	7.19	7.44	7.80	67.9	68.3	69.8
Brazil	1.58	1.49	1.52	9.0	8.5	9.0
EC-10	4.31	4.29	4.37	70.7	70.9	71.1
Spain	.81	.83	.83	12.3	11.8	12.0
Hungary	.39	.36	.37	4.5	4.5	4.5
Soviet Union	2.60	2.70	2.80	75.1	76.5	77.5
Total of 45 countries	23.33	23.86	24.70	345.0	346.5	352.1

1/ Estimated. 2/Forecast.

Global production of broiler meat is expected to total 16.3 million tons in 1984, 2 percent above 1983. Further growth of 3-5 percent is forecast in 1985. Favorable demand for poultry meat and lower feed prices should result in a 4-6 percent output growth in the United States. Despite a smaller feed grain crop, Soviet feed supplies are expected to be adequate for another increase in poultry meat production.

Generally weak demand in export markets is expected to limit 1985 broiler expansion to only 2 percent in the EC and Brazil, not enough to bring production back to the 1982 level. Japanese broiler production is expected to increase about 5 percent in 1984. A significant portion of that increase is due to feeding to heavier weights to meet the needs of the further processing industry.

Broiler and Turkey Meat Production

Country	Broilers 1983	1984 1/	1985 2/	Turkey Meat 1983	1984 1/	1985 2/
	----Thousand Tons---			----Thousand Tons---		
United States	5,625	5,878	6,152	1,195	1,187	1,258
Brazil	1,490	1,400	1,430	NA	NA	NA
EC-10	2,913	2,917	2,960	722	727	748
Spain	748	760	765	20	21	22
Hungary	288	250	280	NA	NA	NA
Soviet Union	800	850	900	49	50	51
Total	15,939	16,309	16,913	2,213	2,205	2,303

Total of 31 countries for broilers and 19 countries for turkeys.

1/ Estimated. 2/ Forecast.

Low returns to turkey producers in 1983 and early 1984 caused output declines in the United States and Italy, while French production remained unchanged. More favorable returns are facilitating production increases in the United Kingdom and in Spain.

In 1985, global turkey meat production is expected to increase 3-5 percent with most of the increase due to recovery in the United States. EC production is expected to increase as prices improve.

COTTON AND FIBERS

CHINA recently announced 1985 state cotton procurement will be limited to 19.5 million bales. Moreover, the new policy calls for more extensive use of improved-quality cotton varieties and larger procurement price adjustments for differences in cotton quality. Cotton production in excess of the 19.5 million bales is to be sold in free markets with cotton producing counties selling directly to commercial concerns in large cites. The intent of the program is to reduce large surplus stocks while improving overall quality of Chinese cotton supplies.

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FRUITS AND NUTS

Citrus production in SELECTED COUNTRIES of the Northern Hemisphere for the 1984/85 season is forecast at 27.3 million tons, down 4 percent from last season's 28.4-million-ton harvest. Production by fruit type, with 1983/84 estimates in parentheses, is as follows in million tons: sweet oranges 16.1 (16.3); tangerines 5.1 (6.1); lemons 2.7 (2.7); grapefruit 2.7 (2.7); and other citrus--including sour oranges and limes--0.76 (0.75).

In the United States, 1984/85 citrus production is forecast to be up 8 percent from last season's freeze-reduced harvest, but 15 percent below the 1982/83 crop and 30 percent below the record 1979/80 crop. All orange production (including temples) is forecast at 7.2 million tons, up 8 percent. The Florida orange crop is forecast at 5.0 million tons, up 3 percent, while the orange harvest in California is expected to total 2.1 million tons, up 28 percent. The U.S. grapefruit crop is projected at 2.0 million tons, up slightly from last season, and the lemon crop at 924,000 tons, up 26 percent. A 305,000-ton tangerine crop (including tangelos) is forecast, down 7 percent from 1983/84. Due to the severe freeze of December 1983, this season's Texas citrus crop is very limited and it is not currently anticipated that significant commercial supplies will become available.

In Japan, citrus production is expected to decline 18 percent from last season. Total tangerine production is forecast at 2.6 million tons, down 20 percent and the smallest harvest since 1969/70. The anticipated downturn in tangerine output is attributed to an unusually severe winter and a continuing area reduction under the government's ongoing production adjustment program.

Spain's citrus crop is expected to be down 13 percent from last season's record harvest. Dry conditions and regional shortages of irrigation water have reduced the size of fruit in some key growing areas. Despite recent increases in plantings, 1984/85 tangerine and lemon output is expected to fall well below last season.

In Italy, citrus production is forecast to be down 19 percent from last season's record crop. The projected downturn is principally the result of the alternate bearing tendency of citrus trees, since weather and other production factors have been mostly favorable. A record Greek citrus crop is forecast for 1984/85, up 12 percent from last season and continuing a recent upward trend. In addition to generally favorable weather conditions, an added stimulus has been provided by a joint Greek-EC citrus improvement program. Output of oranges and lemons is expected to be up 14 percent and 6 percent, respectively, from last season's outturn.

In Israel, total citrus production is expected to be down 7 percent from last season's harvest and the second smallest crop since 1969/70. The projected decline is partially due to a continuing decline in citrus area, especially in northern growing regions. Additionally, an especially dry, warm growing season stressed trees carrying above-average quantities of fruit. Production of oranges is forecast at 862,000 tons, down 9 percent, while grapefruit output is expected to total 375,000 tons, down 6 percent.

In Turkey, the citrus harvest is forecast to be down 11 percent from last season and the smallest crop since 1976/77. Citrus tree numbers continue to increase; however, a freeze two years ago, combined with generally unfavorable weather conditions, will likely lead to the second consecutive drop in citrus output.

Egypt's citrus crop is forecast to be up 4 percent from last season and at a record level. Part of this season's increase is due to an expansion in bearing area for oranges. The expansion should continue following the liberalization of official wholesale and retail price controls. In Morocco, citrus output is expected to be slightly above last season and at the highest level since 1979/80.

Total citrus production in selected countries of the Northern Hemisphere is forecast, by country, as follows in 1,000 tons:

Country	Revised 1983/84 1/	Forecasted 1984/85 1/
United States	9,759	10,556
Cuba	660	690
Japan	3,624	2,962
Spain	3,890	3,380
Italy	3,675	2,986
Greece	945	1,056
Turkey	1,045	932
Israel	1,495	1,387
Egypt	1,556	1,619
Morocco	1,017	1,021
Others 2/	754	737
Total selected Northern Hemisphere	28,420	27,326

1/ Crop year--roughly October-June. 2/ Includes Cyprus, Gaza Strip and Lebanon.

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Apples are the major horticultural item produced in CHILE. Plantings have expanded 54 percent during the past 10 years yielding a concurrent increase in production of 220 percent. Further expansion of both area and output is expected over the next three years as young orchards enter production and others reach full bearing age. Red varieties will account for most of the projected increase.

Apples: Area and Production Estimates
(1,000 Hectares/1,000 Tons)

	1983/84	1984/85	1985/86	1986/87
Area	17.5	18.0	18.4	18.7
Production	400.0	450.0	510.0	550.0

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WORLD FOOD PRICES

FAS Survey of Average Retail Food Prices 1/ in Selected World Capitals, November 1984

Item	Bern	Bonn	Brasilia	Buenos Aires	Canberra	London	Madrid
Steak, sirloin, boneless	19.71	7.88	2.99	2.62	6.93	6.64	7.16
Roast, pork, boneless....	8.61	3.53	3.30	3.85	5.71	2.50	4.79
Broilers, whole..........	2.66	1.54	1.29	1.48	3.42	1.38	2.16
Eggs, dozen..............	2.26	0.90	0.69	0.74	1.61	0.71	1.02
Butter...................	7.05	3.08	2.86	2.89	3.14	1.57	5.85
Cheese, Cheddar..........	7.51	4.71	3.37	9.24	4.29	2.02	6.40
Milk, whole, liter.......	0.64	0.36	0.25	0.37	0.57	0.27	0.32
Oil, cooking, liter......	2.16	0.90	0.96	2.85	1.59	0.61	1.54
Potatoes.................	0.41	0.20	0.17	0.38	0.49	0.16	0.20
Apples...................	1.00	0.68	1.30	0.92	1.31	0.59	0.59
Oranges..................	1.37	1.02	0.31	0.54	0.86	0.77	0.59
Flour....................	0.79	0.46	0.28	0.20	0.79	0.20	0.48
Rice.....................	1.33	1.01	0.40	0.54	0.90	0.54	0.90
Sugar....................	0.58	0.65	0.42	0.63	0.64	0.37	0.60
Coffee...................	7.78	7.67	2.48	3.85	11.15	4.12	6.32
	SFr	DM	Cruzeiros	Pesos	A$	Pounds	Pesetas
Exchange Rates	2.41	3.044	2,609	129.88	0.8712	1.28	164

Item	Mexico City	Ottawa	Paris	Pretoria	Rome	Seoul	Stockholm	Tokyo	Wash. D.C.
Steak, sirloin boneless............	3.30	7.45	6.63	4.60	7.66	10.64	14.48	28.59	7.91
Roast, pork, boneless.	4.71	5.59	4.93	4.20	4.65	3.44	13.67	7.67	6.15
Broilers, whole.......	1.93	2.64	3.67	1.34	2.95	2.14	4.15	3.21	1.87
Eggs, dozen...........	0.72	1.05	0.87	0.69	1.08	1.40	1.74	1.05	0.79
Butter................	3.19	4.27	3.01	1.26	3.31	4.89	3.53	6.07	4.83
Cheese, Cheddar.......	9.87	7.41	5.48	3.02	5.39	NA	6.21	5.20	6.59
Milk, whole, liter....	0.33	0.81	0.45	0.38	0.53	0.86	0.48	0.77	0.55
Oil, cooking, liter...	1.23	1.63	1.75	1.69	1.09	1.67	4.63	1.59	2.35
Potatoes..............	0.45	0.18	0.40	0.29	0.33	0.69	0.42	0.93	1.09
Apples................	1.16	1.38	0.49	0.66	0.66	1.52	1.52	1.97	1.52
Oranges...............	0.33	1.66	1.34	0.52	0.82	1.22 2/	1.59	2.09	0.97
Flour.................	0.22	1.04	0.61	0.42	0.34	0.28	0.67	0.73	0.83
Rice..................	0.54	1.66	0.98	0.86	1.07	1.07 3/	1.76	1.45	0.82
Sugar.................	0.30	0.72	0.62	0.48	0.70	0.83	0.86	1.13	1.42
Coffee................	3.49	8.03	5.12	6.19	7.22	10.86	7.00	13.20	5.27
	Pesos	C$	Francs	Rand	Lira	Won	SKr	Yen	$
Exchange Rates	203	1.316	9.09	1.82	1,828	814	8.42	246	1.00

1/ In U.S. dollars per kilogram or units as indicated and converted at exchange rates. 2/ Tangerines, medium quality. 3/ Top quality traditional (medium grade) variety.
Note: 1 kilogram = 2.2046 pounds; 1 liter = 1.0567 quarts.

The items contained in this survey reflect purchases more typical of U.S. consumers than those of other capitals. Differences in quality, packing and seasonal variation in supply will also tend to affect any strict comparison between such prices. As has been the case in similar surveys conducted over the past two years, the appreciation in the value of the U.S. dollar vis-a-vis other major trading currencies has significantly altered price comparability, i.e. when converted into dollar-equivalents. Nevertheless, such a series shows the relative cost of the various items in the cities surveyed and the wide range in price for some items between cities. The latter is explained by a variety of factors, among which are supply/demand differences, controls and other means of interference with some prices (Madrid, Seoul, Tokyo, Brasilia), the self-sufficiency nature of some capitals (sirloin prices in Brasilia and Buenos Aires, coffee in Brasilia), and the quality and packaging differences referred to earlier.

Selected International Prices

Item	Nov. 27, 1984		Change from previous week	A year ago
ROTTERDAM PRICES 1/	$ per MT	$ per bu.	$ per MT	$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.9/	190.00	5.17	-1.50	199.00
U.S. No. 2 DNS/NS: 14%....	175.00	4.76	0	185.00
U.S. No. 2 S.R.W.	165.50	4.50	+2.50	156.00
U.S. No. 3 H.A.D..........	195.00	5.30	+4.00	198.00
Canadian No. 1 A: Durum.9/	206.50	5.62	-1.50	211.00
Feed grains:				
U.S. No. 3 Yellow Corn....	129.75	3.30	-3.75	159.00
Soybeans and meal:				
U.S. No. 2 Yellow.........	243.00	6.61	-5.25	310.00
Brazil 47/48% SoyaPellets 4/	185.00	--	+2.00	281.00
U.S. 44% Soybean Meal....	167.00	--	0	257.00
U.S. FARM PRICES 3/				
Wheat......................	125.28	3.41	-.73	123.81
Barley.....................	79.46	1.73	-1.38	83.13
Corn.......................	100.39	2.55	2.36	125.98
Sorghum....................	89.51	4.06 6/	0	105.82
Broilers 4/................	1142.86	--	-4.85	1329.81
EC IMPORT LEVIES				
Wheat 5/...................	42.75	1.16	-7.65	71.30
Barley.....................	52.50	1.15	-2.85	46.95
Corn.......................	50.80	1.29	-.80	45.20
Sorghum....................	59.60	1.51	-3.70	59.95
Broilers 4/ 6/ 8/.........	163.00	--	-2.00	249.00
EC INTERVENTION PRICES 7/				
Common wheat(feed quality)	142.60	3.88	-2.05	167.10
Bread wheat (min. quality)7/	152.05	4.14	-2.20	183.10
Barley and all other feed grains.......	142.60	--	-2.05	167.10
Broilers 4/ 6/............	1097.00	--	-17.00	1142.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	N.A.	--	--	41.40
Barley.....................	27.50	.60	-.10	N.A.
Broilers 4/ 6/ 8/.........	96.00	--	-1.00	170.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Twelve-city average, wholesale weighted average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ April-May. N.A.=None authorized. N.Q.=Not quoted. Note: Basis December delivery.

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